



ClientTrack™

*PA HMIS – PATH Project
Enrollment*

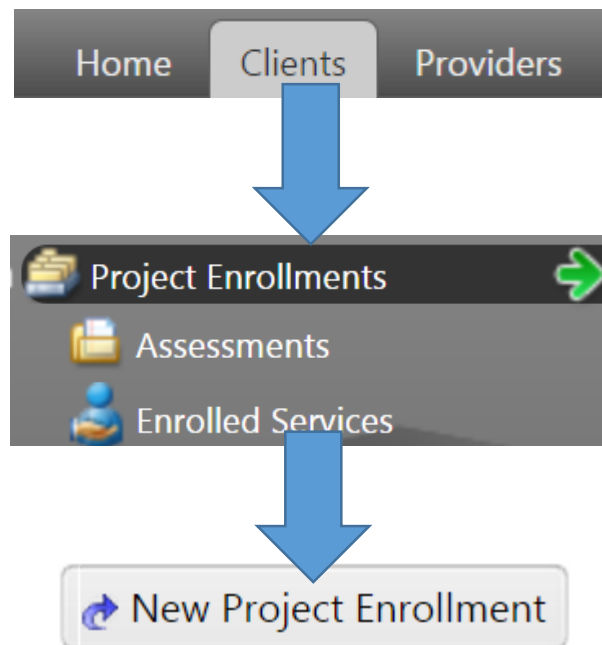
This quick reference guide outlines the components of the ClientTrack HMIS solution related to PATH project enrollment efforts.

PATH Project Workflow

PATH Projects within ClientTrack are used to record a client's contact participation. When the client qualifies for the program, it then tracks the services offered by the organization. A basic project includes both standard enrollment and exit functionality. It marks the time a client spends in active participation within the agency.

The PATH project workflow guides the user through the process of adding/changing household information, performing various assessments and enrolls the client into applicable projects.

Helpful Tip: Each client being enrolled into a PATH project must have a data sharing policy enacted. A signed **Client Consent / Release of Information Form** is required prior to sharing any data globally throughout the system. Until project enrollment is complete, no data sharing policy is necessary.



Project Enrollment

When enrolling a client into a PATH project, the system prompts the user to collect the data related to their PATH eligibility. If a client is not fully enrolled into the PATH project, the enrollment is categorized as a soft enrollment. Soft enrollments limit the client to associated Outreach Contacts.

Helpful Tip: PATH users are to use soft enrollments only while engaged in the client information gathering or contact stages.

Program: * HMIS Service - PATH Program ⓘ
Case Manager: Kamrin Carver ⓘ

Household - Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live in one dwelling unit if they were housed)."

<input type="checkbox"/>	Name ▲	Gender ▲	Age ▲	Enrollment Date ▲	Relationship to Head of Household *	Date of Engagement ▲	Date PATH Status Determined ▲	Client became enrolled in PATH ▲	Reason not enrolled in PATH ▲
<input type="checkbox"/>	Anderson, Kelli	Female			-- SELECT --				
<input type="checkbox"/>	Anderson, Bobby	Male			-- SELECT --				
<input checked="" type="checkbox"/>	Anderson, Pam	Female	32	10/22/2014	Self		10/22/2014	Yes	

Enter the missing information onto the line enrolls the client into the selected project

Once a project is selected, the household members display below to facilitate multiple enrollments

When selecting a full enrollment (or changing a client from a soft enrollment to a full enrollment), the project workflow is launched




Save

Date of Contact: * 10/17/2014 ⓘ
Contact with: Kamrin Carver ⓘ
Project Enrollment: * 10/17/2014 - HMIS Service - PATH Program ⓘ
Contact Service: * PATH Contact ▼
Contact Location: * Service Setting, non-residential ▼
Exact geographic location: POINT(-111.876261 40.674) ⓘ
Comments:

Enter the **Contact Service** provided, if applicable, or click the **No Outreach Provided** button.

Save **No Outreach Provided**

Helpful Tip: The “Client become enrolled in PATH” enrollment element express whether it is a soft (no answer) or full (yes answer) enrollment type. A soft enrollment can be turned into a full enrollment at any time by using the “Complete PATH Enrollment function.






Enrollment Description ▲	Case Members ▲	Enroll Date ▼	Exit Date ▲	Organization ▲	Last Assessment Completed ▲	PATH Enrollment Status
Current						
 HMIS Service - PATH Program	1	10/24/2014		HMIS Service Agency	10/24/2014	Enrolled
 Downtown - SSVF Homeless Prevention	1	10/23/2014		Downtown Shelter Services, Inc.	10/23/2014	N/A
 HMIS Service - PATH Program	1	10/22/2014				Contact Only

Each PATH enrollment denotes it's soft (Contact only) vs. full (Enrolled) status

Transactional Sharing

Each transaction (i.e. enrollment, assessment, service, check-in records) and its sharing are based off of the client's data sharing policy and are shared throughout the system on the Client Dashboard and through individual transactional review screens based on this setting.

Each type of transaction recorded or edited in the system related to one of the four following transaction sharing setting recorded in the client's Data Sharing Policy. Transactions that are shared can be viewed by users outside of your organization, non-shared transactions will remain viewable only by your organization.

Globally Shared Transactional Elements 	
Pre-Enrollment Screenings:	<input checked="" type="checkbox"/> 
Project Enrollments:	<input checked="" type="checkbox"/> 
Project Assessments:	<input checked="" type="checkbox"/> 
Project Services:	<input checked="" type="checkbox"/> 

Pre-Enrollment Screenings: will relate to any individual assessment that is collected prior to a project enrollment for eligibility determination and service needs and is currently no used

Project Enrollments: related to the sharing of the full project enrollment record and exit enrollment information


Project Assessments: relate to the individual assessments collected during a project enrollment such as Health, Income, Benefits, Employment, etc.

Project Services: relate to the individual services provided to the client such as Case Management or Rental Assistance and also cover housing/shelter check-ins

Helpful Tip: When a Project Enrollment record is set to “Not Shared”, all assessments and services collected under that enrollment will remain hidden to outside organizations

Shared Transactions

When the transactional sharing option is selected or checked, the user has the option to set the Sharing restriction setting for the transaction, which defaults to **“Share Transaction”**.




Assessment Sharing: Shared

Restriction: * ☐ Do Not Share Transaction ? ☒ Share Transaction

Not Shared Transactions

When transactional sharing option is not selected or not checked, the Sharing restriction setting for the transaction defaults to **“Do Not Share Transaction”** and will be hidden on the screen.



Assessment Date: * 10/22/2014

Assessment Type: * Entry

Program: * HMIS Service - PATH Program

Assessment Sharing: Not Shared

Project Functions

After a client's project enrollment is complete, the user then has the option of viewing, editing, or adding to any of the existing assessments from the client dashboard. Household members can also be added, and the enrollment can be exited from the blue action arrow drop-down menu.



Edit Enrollment

Editing an enrollment consists of modifying the household information

<input type="checkbox"/>	Name ▲	Gender ▲	Age ▲	Enrollment Date ▲	Relationship to Head of Household* ▲
<input checked="" type="checkbox"/>	Anderson, Pam	Female	32	10/19/2014	Self ▼
<input checked="" type="checkbox"/>	Anderson, Ricky	Male	13	10/19/2014	Son ▼
<input checked="" type="checkbox"/>	Anderson, Shania	Female	10	10/19/2014	Daughter ▼

3

Project Sharing: Shared

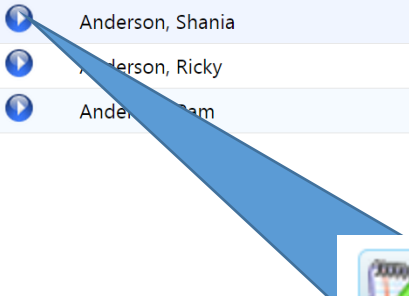
Restriction:* ☐ Do Not Share Transaction


View Case Members


The **Enrollment Case Members** screen allows the user to view a household and to modify the information of its individual members by selecting from the blue action arrow drop-down options. Household members can be edited, exited from the enrollment or deleted from the enrollment.


3 records found.

	Case Member ▲	Grant ▲	Relationship ▲	Enroll Date ▲	Exit Date ▲	Client ID ▲
	Anderson, Shania		Daughter	10/19/2014		10375
	Anderson, Ricky		Son	10/19/2014		10374
	Anderson, Pam		Self	10/19/2014		10370









 **Edit Enrollment**

 **Exit the Enrollment**

 **Delete Enrollment**

Add Household Member to this Enrollment

When adding household members, it is important to first verify that the client is not already listed as part of the family. If they do not display on the **Household Members** screen, add them to the blank row at the bottom of the list.

	First Name*	Middle Name	Last Name*	Name Quality	Gender	Birth Date*
<input checked="" type="checkbox"/>	Kelli		Anderson	-- SELECT --	Female	
<input checked="" type="checkbox"/>	 Pam		Anderson	-- SELECT --	Female	03/17/1982
<input checked="" type="checkbox"/>	 John		Anderson	-- SELECT --	Male	10/18/1983
<input checked="" type="checkbox"/>	 Bobby		Anderson	-- SELECT --	Male	01/14/2001
<input checked="" type="checkbox"/>	 Ricky		Anderson	-- SELECT --	Male	01/18/2001
<input checked="" type="checkbox"/>	 Samantha		Anderson	-- SELECT --	Female	11/29/2001
<input checked="" type="checkbox"/>	 Shania		Anderson	-- SELECT --	Female	11/02/2003
<input type="checkbox"/>				-- SELECT --	-- SELECT --	



Do you want to enroll?

Do you want to enroll Anderson, John?

☒ Yes

☐ No

After adding the new family member, the **Add Household Member** workflow prompts the user to enroll any family members who are not already enrolled in a project

Review Entry/Exit Assessments

The **Project Assessments** screen allows the user to view existing assessments and complete any missing assessments.

[Complete Missing Assessments](#)

HMIS Enrollment Assessment:					
1 record found.					
Assessment Date ▲	Assessment	Assessment Type ▲	Program ▲	Assessor ▲	
10/19/2014	HMIS Enrollment	Entry	HMIS Transitional Housing Program	Brian Miller	

HMIS Health Barrier Assessment:					
1 record found.					
Assessment Date ▲	Assessment	Assessment Type ▲	Program ▲	Assessor ▲	
10/19/2014	HMIS Health Barriers	Entry	HMIS Transitional Housing Program	Brian Miller	

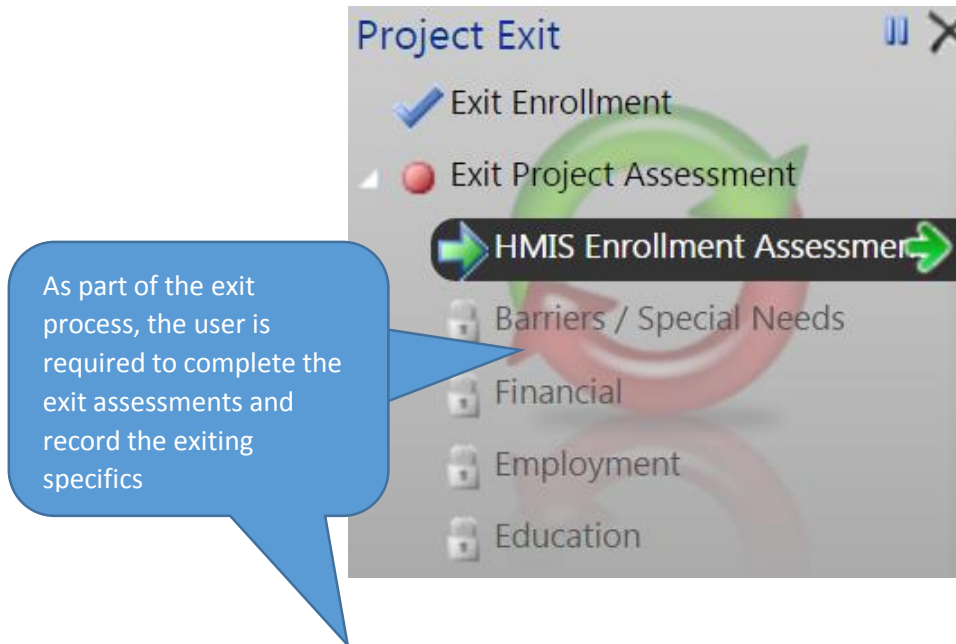
Perform Annual Assessments

The **Project Annual Assessment** workflow is designed to annually assess all members of the household who are enrolled into a project. Users may update and modify information or skip assessments which do not require an update.



Exit the Enrollment

The system opens a **Project Exit** workflow to remove a client from project participation.



Exit Date:* 10/23/2014

Destination:* Hospital or other residential non-psychiatric medical facility

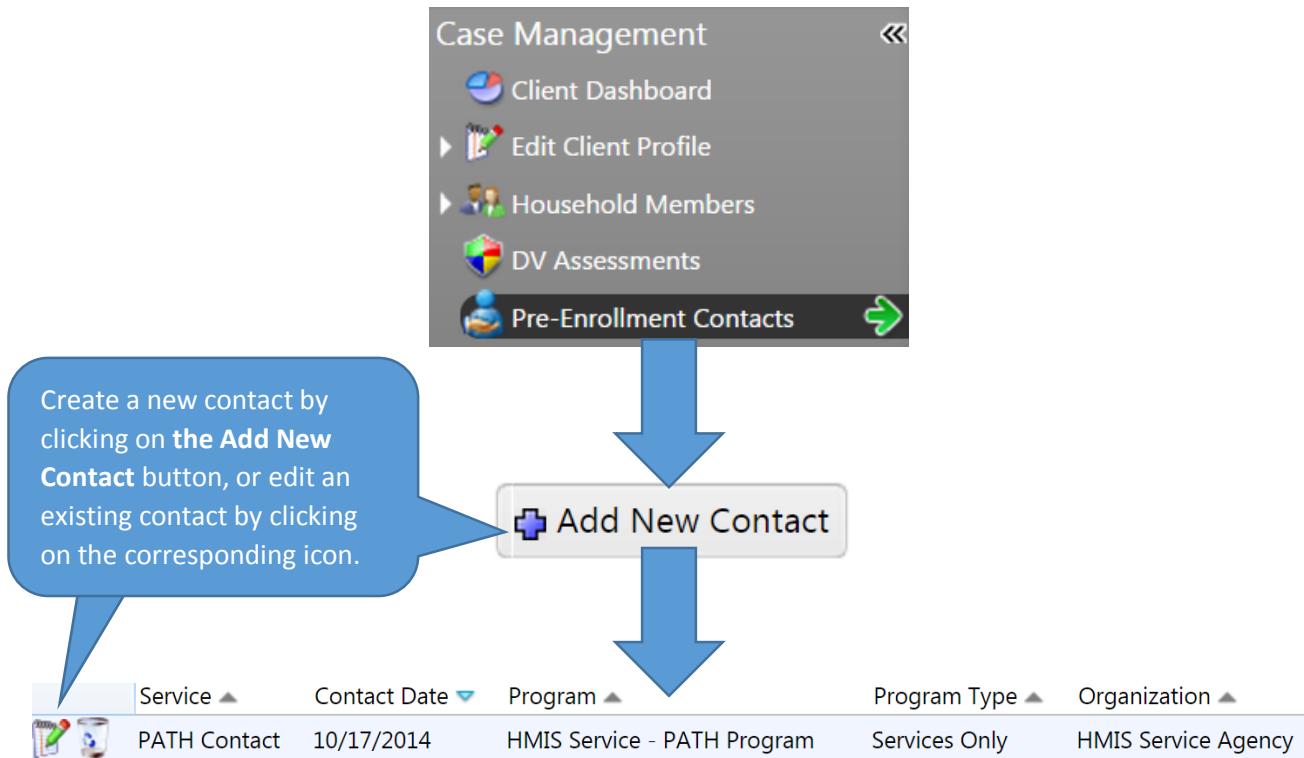
Reason for Leaving: Left for a housing opportunity before completing program ▾

Assigned Case Manager(s): Brian Miller

End Case Assignment(s): ☒

Pre-Enrollment Contacts

Contacts for PATH and street outreach are stored and can be edited on the **Client Outreach / Contact Services** screen.



Helpful Tip: If the client is not fully enrolled into the PATH program, it is considered a soft enrollment and will be 'auto-exited' after 30 days.
